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ABSTRACT

A Europe-wide consultation elicited contributions from more than 12,000 citizens and was conducted to identify coherent strategies and practical measures with a view toward fostering lifelong learning for all. The responses called for a broad definition of lifelong learning that emphasizes learning from preschool to postretirement and encompasses a whole spectrum of formal, nonformal, and informal learning. The consultation also highlighted the objectives of learning, including active citizenship, personal fulfillment, and social inclusion, as well as employment-related aspects. The following building blocks of coherent and comprehensive lifelong learning strategies were identified: (1) a partnership approach; (2) gaining insight into the needs of learners, potential learners, organizations, communities, wider society, and the labor market; (3) adequate resourcing; (4) facilitating access by developing the supply side; (5) creating a culture of learning; and (6) striving for excellence. The following were among the areas deemed priorities for action: (1) developing a comprehensive European approach to value learning; (2) information, guidance, and counseling; (3) investing time and money in learning; (4) bringing learning and learners closer together; (5) developing basic skills to give all citizens the foundations of lifelong learning; and (6) fostering innovative pedagogy. (A list of nine proposals regarding research and evaluation is appended along with a glossary. Eighty-six endnotes are listed.) (MN)

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EUROPEAN COMMISSION

Directorate-General for Education and Culture
Directorate-General for Employment and Social Affairs

Communication from the Commission

MAKING A EUROPEAN AREA OF LIFELONG LEARNING A REALITY

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COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 21.11.01
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COMMUNICATION FROM THE COMMISSION

Making a European Area of Lifelong Learning a Reality

"When planning for a year, plant corn. When planning for a decade, plant trees. When planning for life, train and educate people." Chinese proverb: Guanzi (c. 645BC)

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EXECUTIVE SUMMARY

The Feira European Council in June 2000 asked the Member States, the Council and the Commission, within their areas of competence, to "identify coherent strategies and practical measures with a view to fostering lifelong learning for all". This mandate confirms lifelong learning as a key element of the strategy, devised at Lisbon, to make Europe the most competitive and dynamic knowledge-based society in the world.

People are at the heart of this Communication. Over 12,000 citizens contributed to the consultation which was initiated by the Commission's Memorandum on Lifelong Learning, issued in November of last year. The feedback highlighted only too clearly the enormity of the challenges ahead. Economic and social changes associated with the transition to a knowledge-based society present the European Union and its citizens with both benefits – in terms of increased opportunities for communication, travel and employment, and risks – not least relating to higher levels of inequality and social exclusion. The scale of such changes calls for a radical new approach to education and training. Moreover, the current uncertain economic climate places renewed emphasis and importance on lifelong learning. Traditional policies and institutions are increasingly ill-equipped to empower citizens for actively dealing with the consequences of globalisation, demographic change, digital technology and environmental damage. Yet people, their knowledge and competences are the key to Europe's future.

A European area of lifelong learning

This Communication contributes to the establishment of a European area of lifelong learning, the aims of which are both to empower citizens to move freely between learning settings, jobs, regions and countries, making the most of their knowledge and competences, and to meet the goals and ambitions of the European Union and the candidate countries to be more prosperous, inclusive, tolerant and democratic.

This development will be facilitated by bringing together within a lifelong learning framework education and training, and important elements of existing European level processes, strategies and plans concerned with youth, employment, social inclusion, and research policy. This does not imply a new process, nor can it involve the harmonisation of laws and regulations. Rather, it calls for more coherent and economical use of existing instruments and resources, including through the use of the open method of coordination. In order to achieve the Lisbon aim of a knowledge-based society, close links will be established between the European area of lifelong learning and the European research area, particularly with a view to raising the interest of young people in science and technology careers.

What is lifelong learning?

Responses to the consultation on the Memorandum called for a broad definition of lifelong learning that is not limited to a purely economic outlook or just to learning for adults. In addition to the emphasis it places on learning from pre-school to post-retirement, lifelong learning should encompass the whole spectrum of formal, non-formal and informal learning. The consultation also highlighted the objectives of learning, including active citizenship, personal fulfilment and social inclusion, as well as employment-related aspects. The principles which underpin lifelong learning and

guide its effective implementation emphasise the centrality of the learner, the importance of equal opportunities and the quality and relevance of learning opportunities.

Coherent and comprehensive lifelong learning strategies

Member States agreed at the Feira European Council, and in the context of the European Employment Strategy, to develop and implement coherent and comprehensive strategies for lifelong learning. The building blocks of such strategies are set out here in order to assist Member States and actors at all levels. The implication of the building blocks is a gradual integration of formal learning environments with a view to making quality learning opportunities accessible for all, on an ongoing basis. The clear message is that traditional systems must be transformed to become much more open and flexible, so that learners can have individual learning pathways, suitable to their needs and interests, and thus genuinely take advantage of equal opportunities throughout their lives. The building blocks are consistent with the lifelong learning assessment criteria used in the Joint Employment Report 2001.

A partnership approach is stipulated as the first building block. All relevant actors, in and outside the formal systems, must collaborate for strategies to work 'on the ground'. Gaining insight into the needs of the learner, or the potential learner, along with learning needs of organisations, communities, wider society and the labour market is the next step. Adequate resourcing, in terms of financing and the effective and transparent allocation of resources, can then be addressed. The analysis then proceeds to how to match learning opportunities to learners' needs and interests and how to facilitate access by developing the supply side to enable learning by anyone, anywhere, at any time. There is a clear need here for the formal sector to recognise and value non-formal and informal learning. Creating a culture of learning depends ultimately on increasing learning opportunities, raising participation levels and stimulating demand for learning. Finally, mechanisms for quality assurance, evaluation and monitoring are suggested, with a view to striving for excellence on an ongoing basis.

Priorities for action

Action is proposed which builds on the European dimension to lifelong learning, while also supporting strategies at all levels. The priorities are presented under the six key messages, which were the basis of, and endorsed by, the European-wide consultation.

A comprehensive new European approach to valuing learning is seen as a pre-requisite for the area of lifelong learning, building on the existing right of free movement within the EU. Proposals focus on the identification, assessment and recognition of non-formal and informal learning as well as on the transfer and mutual recognition of formal certificates and diplomas. Information, guidance and counselling is addressed mainly at European level, with proposals that aim at facilitating access to learning through the availability of quality guidance services.

Investing time and money in learning, particularly in the context of the call for Member States to raise overall levels of investment in education and training in the

Lisbon conclusions and in the European Employment Strategy, is a condition of bringing about the kind of fundamental changes which lifelong learning implies. There are no easy solutions to how this is to be achieved. Increased investment and targeted funding are called for, along with mechanisms for increasing private investment. Proposals to encourage and support learning communities, cities and regions as well as enabling workplaces to become learning organisations are seen as key ways to bring learning and learners closer together. Importance is also attached to the development of local learning centres.

Complementing the work initiated at Lisbon and Stockholm on the 'new' basic skills, proposals are developed to ensure that the foundations of lifelong learning are accessible to all citizens, at all stages of their lives and not just within compulsory education. Finally, proposals for innovative pedagogy address the shift in emphasis from knowledge acquisition to competence development, and the new roles for teachers and learners that this implies.

Driving forward the agenda

All actors are invited to work in partnership to drive forward the agenda: the Commission and the other European Institutions, the Member States, the EEA and candidate countries, the social partners, NGOs and international organisations (e.g. the Council of Europe, OECD, UNESCO). Implementation will be through existing processes, programmes and instruments, taken forward within the framework of lifelong learning. This framework will support the exchange of good practice and experience and thus the identification of shared problems, ideas and priorities. To facilitate this, the Commission will develop a database on good practice, information and experience concerning lifelong learning at all levels.

The Follow-up to the Report on the Concrete Objectives of Education and Training Systems will be one of the main means for cooperation in this field, while the European Employment Strategy will continue to focus on the employment-related aspects of lifelong learning. The Community programmes – Socrates, Leonardo da Vinci and Youth – will be strengthened in the light of this Communication. Increasing the potential of the European Social Fund (ESF) and the ESF Community Initiative EQUAL to support implementation will also be examined.

Progress will be measured and monitored through the use of a limited number of indicators – those in existence or development, as well as a small number of new indicators. Implementation will also be overseen by networks and structures: those already established, for example, as part of the consultation process, and a high level group of representatives of Ministries bearing the main responsibility for lifelong learning. This group will help to ensure the complementarity of measures developed in the field of lifelong learning, including the implementation of the work programme for the Follow-up of the Report on the Concrete Objectives of Education and Training Systems, with related processes, strategies and plans at European level. The next steps will be an endorsement of the main principles and proposals by the Council (Education and Youth Council, and the Employment and Social Policy Council), during the Spanish Presidency. There will also be a contribution by the Commission on lifelong learning to the Barcelona Spring Council of 15-16 March 2002.

1. INTRODUCTION

The Lisbon European Council in March 2000 set the European Union the strategic goal, reaffirmed at the Stockholm European Council in March 2001, of becoming the most competitive and dynamic knowledge-based society in the world. Key elements of the strategy to achieve this were the adaptation of education and training to offer tailored learning opportunities to individual citizens at all stages of their lives; the promotion of employability and social inclusion through investment in citizens' knowledge and competences; the creation of an information society for all; and the fostering of mobility.

1.1. The context

The knowledge-based society, along with wider economic and societal trends such as globalisation, changes in family structures, demographic change, and the impact of information society technologies, presents the European Union and its citizens with many potential benefits as well as challenges. Citizens have vast new opportunities in terms of communication, travel and employment. Taking advantage of these opportunities, and actively participating in society, is reliant on the ongoing acquisition of knowledge and competences. At the same time, competitive advantage is increasingly dependent on investment in human capital. Knowledge and competences are, therefore, also a powerful engine for economic growth. Given the current uncertain economic climate, investing in people becomes all the more important.

On the downside, there are considerable risks and uncertainties associated with the knowledge-based society, as it threatens to bring about greater inequalities and social exclusion. The seeds of inequality start early in life with participation in initial education a key factor. In 2000, the proportion of 25-64 year olds in the EU having attained at least upper secondary level education was just 60.3%.[1] Significant disparities between Member States may be closing due to better schooling for successive cohorts of young people, but almost 150 million people in the EU without this basic level of education face a higher risk of marginalisation.

Lifelong learning has been the subject of policy discussion and development for many years now. Yet today there is a greater need than ever for citizens to acquire the knowledge and competences necessary both to tap into the benefits, and to meet the challenges of the knowledge-based society. This is why the Lisbon European Council confirmed lifelong learning as a basic component of the European social model.

In economic terms, the employability and adaptability of citizens is vital for Europe to maintain its commitment to becoming the most competitive and dynamic knowledge-based society in the world. Labour shortages and competence gaps risk limiting the capacity of the European Union for further growth, at any point in the economic cycle. Lifelong learning, therefore, has a key role to play in developing a coordinated strategy for employment and particularly for promoting a skilled, trained and adaptable workforce. This means removing the barriers that prevent people from entering the labour market and limit progression within it. Tackling inequality and social exclusion is part of this.

Lifelong learning is, however, about much more than economics. It also promotes the goals and ambitions of European countries to become more inclusive, tolerant and democratic. And it promises a Europe in which citizens have the opportunity and ability to realise their ambitions and to participate in building a better society. Indeed, a recent OECD report refers to the growing evidence that learning and investment in human capital is associated not just with increased GDP, but also with greater civic participation, higher reported well-being and lower criminality.[2]

Higher levels of education and continuous learning, when accessible to all, make an important contribution to reducing inequalities and preventing marginalisation. This, however, raises fundamental questions about how well equipped traditional education and training systems are to keep pace with the developments outlined above. The scale of the challenge is highlighted by data on participation: albeit limited in terms of the age range and types of learning covered, it is nevertheless indicative that the Labour Force Survey in 2000 found only 8% of EU 25-64 year olds participating in education and training – some way off the vision of lifelong learning for all.[3] In this context, there is an increasing recognition across Europe that a fundamentally new approach to education and training policies should be developed and implemented within the framework of lifelong learning. Whereas traditional policies have tended to focus too strongly on institutional arrangements, lifelong learning places the emphasis on people and on collective aspirations to create a better society. Lifelong learning takes a comprehensive view of the supply and demand for learning opportunities. It values knowledge and competences gained in all spheres of modern life, and which are therefore relevant to coping with modern society. The effective implementation of lifelong learning in the EU requires more, better and more equitably distributed investment, especially given that few Member States match the overall expenditure rates of Canada, South Korea, Norway and the United States,[4].

This is why the Feira European Council in June 2000 invited the "Member States, the Council and the Commission ... within their areas of competence, to identify coherent strategies and practical measures with a view to fostering lifelong learning for all".[5] This Communication takes up that mandate.

1.2. The European-wide consultation

In November 2000, based on the conclusions of the 1996 European Year of Lifelong Learning[6] and subsequent experience gained at European and national levels, the Commission issued a Memorandum on Lifelong Learning. This formed the basis for a European-wide consultation, organised as close to the citizens as possible, in accordance with the Commission's aim of reforming European governance. The Member States, the EEA, and candidate countries each conducted their own inclusive and wide-ranging consultation involving relevant national bodies. The candidate countries have been fully involved in, and have made a significant contribution to the consultation process, and will continue to contribute to the development of lifelong learning.

At European level, the Commission consulted the social partners, the European Parliament, the Economic and Social Committee and the Committee of the Regions, and also organised a consultation of European civil society, which culminated in a conference held in Brussels on 10 September 2001. The Commission also consulted

various international organisations, in particular the Council of Europe, the OECD and UNESCO.

In all, some 3,000 individual submissions were sent to the Commission, the Member States, the EEA and candidate countries, and to European institutions and bodies representing civil society and the social partners. Some 12,000 citizens participated in meetings and conferences organised as part of the process.[7] The results of this wide-ranging consultation therefore form a solid basis for the present Communication.

1.3. A European area of lifelong learning

The consultation stressed that cooperation and coordination in this field at European level is essential. This is already taking place through several distinct but complementary processes, strategies and plans. The theme of lifelong learning runs through all these initiatives, each time addressed from a specific angle. Following the request by the Lisbon European Council, the Education Council adopted a Report on the Concrete Future Objectives of Education and Training Systems.[8] The Commission then adopted in September 2001 a report containing a draft detailed work programme on the Follow-up to the Objectives Report,[9] which will form the basis of a joint report to be presented, on the invitation of the Stockholm Council[10], to the Spring European Council in 2002. The European Employment Strategy[11] features a horizontal objective on lifelong learning and specific guidelines that focus on the employment-and labour market-related aspects of lifelong learning. The European Social Agenda[12] aims to reduce inequalities and promote social cohesion, including through lifelong learning. The Skills and Mobility Action Plan[13] will aim to ensure that European labour markets are open and accessible to all by 2005. The eLearning initiative[14] part of the eEurope Action Plan, seeks to promote a digital culture and wider use of information and communication technologies (ICT) in education and training. Finally, the White Paper on Youth provides the Community with a framework for cooperation in the field of youth policy, focusing on participation of young people, their education, employment and social inclusion.

While each of these strands has its own specificity and objectives, taken together they contribute to the realisation of a European area of lifelong learning. To facilitate this development, education and training will be brought together within a lifelong learning framework in synergy with the relevant elements of the other processes, strategies and plans. In particular, in order to achieve the Lisbon aim of a knowledge-based society, the European area of lifelong learning will be closely linked with the European research area, notably in relation to the Communication on a mobility strategy for this area[15]. An important component of this strategy for developing human capital could be the fostering of trans-European networks for knowledge and science.

The objectives of a European area of lifelong learning must be both to empower citizens to meet the challenges of the knowledge-based society, moving freely between learning settings, jobs, regions and countries in pursuit of learning; and to meet the goals and ambitions of the European Union and the candidate countries to be more prosperous, inclusive, tolerant and democratic. In concrete terms, this means that Member States must develop and implement coherent and comprehensive strategies for lifelong learning; and it requires concerted action initiated at European

level, in accordance with agreed priorities. Such action should both support and add value to Member States' efforts.

1.4. What do we mean by lifelong learning?

The Memorandum on Lifelong Learning cited the definition of lifelong learning established in the context of the European Employment Strategy, as a starting point for debate during the consultation.[16] The consultation particularly welcomed the idea that lifelong learning should comprise all phases and forms of learning from pre-school to post-retirement. There were, however, concerns that the employment and labour market dimensions of lifelong learning were too dominant within the definition. Indeed, in relation to specifying the objectives of lifelong learning, responses tended to echo the Memorandum as well as citing wider aspects such as the spiritual and cultural dimensions of learning. Overall, consensus can be surmised around the following four broad and mutually supporting objectives: personal fulfilment, active citizenship, social inclusion and employability/adaptability. That lifelong learning promotes this wide range of objectives is reflected in the extended definition below, in the light of which all references to lifelong learning in this document should be understood.

"all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective".

The breadth of this definition also draws attention to the full range of formal, non-formal and informal learning activity.[17]

The consultation also saw considerable debate on the fundamental principles underpinning lifelong learning. A key characteristic is the centrality of the learner within formal, non-formal and informal learning experiences. Equality of opportunity, both in terms of gender mainstreaming and making learning genuinely available for all, without discrimination, is a crucial concern, not least because of the way in which knowledge and competences impact on citizens' life opportunities. Consultation responses also stressed the importance of high quality and relevance, as investments of time and money in learning are fully effective only if the learning conditions and the underlying policy planning and systems are of high quality. These principles broadly reflect the points set out in the Council conclusions following the 1996 European Year of Lifelong Learning and the OECD's 2001 Education Policy Analysis[18]. They inform the concept of lifelong learning and shape its implementation.

1.5. Structure of the document

The following sections focus specifically on practical measures to implement the European area of lifelong learning at all levels. In section 2, in order to assist policy making, the building blocks for coherent and comprehensive strategies are specified. In section 3, priorities for action in support of these strategies are proposed. Section 4 concerns driving forward the agenda through the strengthening of existing processes, instruments and programmes and through the development of indicators. Finally, section 5 sets out the next steps.

2. COHERENT AND COMPREHENSIVE LIFELONG LEARNING STRATEGIES

Following the Feira European Council, and in the context of the European Employment Strategy, Member States have agreed to develop and implement coherent and comprehensive national strategies for lifelong learning. Although such strategies are in place in half of the Member States, they remain at early stages of implementation; in Member States without overall strategies, measures tend to be piecemeal[19]. This section presents the building blocks for developing and implementing such strategies. The analysis is made in the light of consultation responses to the Memorandum, together with Member States' Employment and Social Inclusion National Action Plans and other inputs. The building blocks have been formulated according to the four objectives of active citizenship, personal fulfilment, employability and social inclusion, as well as the principles of lifelong learning as set out in section 1.4.

These building blocks are consistent with the criteria used in the Joint Employment Report 2001 for assessing the coherence and comprehensiveness of Member States' lifelong learning strategies. *Partnership working, Creating a learning culture, and Striving for excellence* are about achieving coherence, while *Insight into demand for learning, Facilitating access* and *Adequate resourcing* ensure that the approach is comprehensive.

The building blocks apply principally to the national level, and are thus designed to assist Member States meet their commitment to develop and implement coherent and comprehensive strategies. The approach recommended here is, however, relevant to all levels. Indeed, if strategies are to be coherent, complementarity between the various levels of implementation is critical. In this sense, the building blocks incorporate the European dimension. For instance, under the Insight into demand for learning block, the assessment and forecasting of competence needs across European labour markets – to be addressed concretely in the forthcoming Skills and Mobility Action Plan – will be relevant to the national and sub-national levels. Similarly, partnership working will inevitably include cooperation between actors at national and European level; European funds will have an impact on adequate resourcing at all levels; and the evaluation of national strategies will continue to take place in the context of the European Employment Strategy.

Sharing of roles and responsibilities

The following description is indicative only: actors' roles and responsibilities vary according to different national and other practices, systems and contexts. Lifelong learning partnerships at all levels should consider and develop such roles and responsibilities in the light of circumstances.

Public authorities are responsible for providing the necessary resources for, and ensuring access for all citizens to compulsory education and training and post-compulsory basic skills provision, as well as ensuring that pre-school and adult learning opportunities are available. In addition, they must take the lead in developing and implementing lifelong learning strategies at all levels. This includes ensuring the rights of citizens to have access to opportunities for acquiring and updating knowledge and competences throughout life (as set out in the preamble to the Amsterdam Treaty), with the assistance of guidance services. Public authorities are

also responsible for active labour market measures for the unemployed and promoting learning for all, both in- and outside the labour market. Employers have the main responsibility to provide for developing the competences of their workforce and are increasingly taking on wider corporate social responsibilities, for example when they open up their training opportunities and resources to a wider public[20]. Trade unions increasingly deliver learning to their members, and participate in activities to promote and facilitate learning amongst members and non-members alike. Together, the social partners conduct social dialogue at all levels, and negotiate and implement agreements in respect of education and training in the workplace. Learning providers of all kinds have a responsibility for the quality and relevance of their learning provision, as well as its coherence within the overall learning offer. Community and voluntary groups have unique opportunities to deliver targeted learning, to promote learning amongst (potential) learners and to articulate their needs and interests. All actors share a responsibility to work together on lifelong learning – as reflected in the 'partnership working' building block below – and to support individuals in taking responsibility for their own learning.

A prominent conclusion from the consultation, and one which cuts across all the building blocks, was that Member States must fundamentally transform learning systems, including initial education, with a view to making quality learning opportunities accessible to all on an ongoing basis. The feedback confirmed the need for the gradual integration of formal learning environments, in order to make them much more open and flexible, so that learners can haveindividual learning pathways, suitable to their needs and interests, and thus take advantage of equal opportunities throughout their lives.

Partnership working across the learning spectrum

Partnerships reflect the shared benefits of, and responsibility for, lifelong learning. Joint/coordinated action is often also the most responsive to different circumstances and the most effective, building on diverse expertise, strengths and resources. Lifelong learning strategies must bring together, and be supported by, all actors:[21]

- As well as promoting partnership at all levels, national, regional and local, Governments should lead by example by ensuring effective coordination and coherence in policy between ministries;

- Local level partnerships are essential for strategies to work 'on the ground'. These should include local authorities, schools, universities, other learning providers and related services such as information, guidance and counselling, research centres, enterprises (as part of their corporate social responsibility), public employment services, NGOs working at the local level (e.g. voluntary and community organisations), representatives of particular groups of (potential) learners[22], and actors dealing with gender equality issues;

- The social partners should also be actively involved, whenever relevant, given their multiple role as 'consumers', investors, negotiators and promoters of learning;

- Efforts to make a reality of lifelong learning must be supported at European level including through the sharing of ideas, experiences and good practice and actions to establish the European area of lifelong learning (see sections 3 and 4).

Insight into demand for learning

An understanding of the needs for learning amongst citizens, communities, wider society and the labour market should be the basis of any strategy for lifelong learning. Such an understanding must be grounded in evidence from the local level. This is a prerequisite for ensuring an effective learner centred approach and equality of opportunity. Work should focus on:

- Literacy, numeracy, ICT and other basic skills[23] needs: the foundation for further learning, which will often need to be updated throughout life. Citizens/groups most alienated from learning, whose needs and interests are varied, may require tailored measures;

- Addressing the impact of lifelong learning on learning facilitators[24] such as teachers, trainers, adult educators and guidance workers. Strategies and partnerships must address their role and support their adaptation;

- The needs of employers in general, as well as the particular needs of SMEs, who employ a significant proportion of the EU's workforce, yet who often encounter difficulties in making finance or time available for training or in finding training which is relevant to their needs. Motivating employers is important in this respect;

- Understanding (potential) learners' interests, reflected in surveys, evaluations, feedback from guidance surveys and consultations, data on imbalances in learning participation (e.g. gender mix in ICT learning);

- Taking into account the implications of the knowledge-based society for the needs of learners (new basic skills, including entrepreneurship, science and technology), and labour markets (for example the importance of competence forecasting to avoid shortages, upskilling those inside the labour market to ensure they do not become excluded).

Adequate resourcing

Achieving the vision of lifelong learning for all, with the fundamental changes in thinking, systems, structures and working which this implies, calls for higher levels of investment, as the Lisbon conclusions and the European Employment Strategy require. These should be allocated effectively and efficiently.[25] In particular, this means that:

- Overall rates of public and private investment must be raised. Such increases should be based on shared responsibility between government, public authorities, employers, social partners and individual citizens;

- Adequate resources must be made available and/or existing resources must be rechannelled across the spectrum of formal, non-formal and informal learning, including pre-school learning. At the same time, transparency in the allocation of resources is essential if declared priorities are to be respected in terms of funding;

- New approaches to investment are needed to account for the new types of knowledge and competences that are required by the development of the knowledge-based society, both in respect of (potential) learners and learning

facilitators. Fiscal and other incentives for learning are approaches which should be developed for all citizens, in and outside the labour market;

- Increased levels of investment must be properly integrated with strategies at the local level in order to have maximum impact;

- New tasks and roles, recruitment and retention in the teaching and training professions at all levels must be addressed, particularly given projected recruitment needs.

Facilitating access to learning opportunities

There should be a dual approach to access to learning: making what is already on offer more visible, flexible, integrated and effective, while also developing new learning processes, products and environments.[26] Strategies must also address issues of equality of opportunity (e.g. gender equality) and of targeting specific groups, in order to ensure lifelong learning opportunities are genuinely available to all, especially those at particular risk of exclusion such as people on low income, disabled people, ethnic minorities and immigrants, early school leavers, lone parents, unemployed people, parents returning to the labour market, workers with low levels of education and training, people outside the labour market, senior citizens (including older workers), and ex-offenders. Such targeting should address the needs not only of people in deprived urban areas, but also those in rural areas who may have particular learning needs. Key points include:

- Removing social, geographical, psychological and other barriers, for example by promoting ICT, workplace learning and local learning centres to bring learning and learners together at times/paces and in places suited to people's other commitments;

- Within the formal sector, adapting entry, progression and recognition requirements to take account of non-formal and informal learning;

- Complementing mainstream provision with tailored measures, especially for basic skills, targeted at specific individual needs. Ensuring availability of specialist provision to meet any unmet demand, for example by encouraging higher education establishments to work with those at risk of exclusion;

- Social partners should work together and with other actors to ensure the trend towards greater flexibility in the organisation of work is accompanied by adequate investment by employers in their workforce – a key dimension of quality in work;[27]

- Recognising information, guidance and counselling services as a key interface between learning needs and the learning on offer. They are also crucial in helping learners find their place in increasingly complex learning systems.

Creating a learning culture

For strategies to foster a learning-for-all culture, direct measures are needed to motivate (potential) learners and raise overall participation levels by making learning

more desirable in terms of active citizenship, personal fulfilment and/or employability. Such measures should include:

- Valuing and rewarding learning, especially non-formal and informal learning in all sectors, thereby recognising its intrinsic worth. Rewarding learning can also encourage those who are most alienated to return to learning;

- Promoting more positive perceptions of learning and raising awareness of any entitlements and the benefits of learning, e.g. through media campaigns, from the earliest age – at pre-school, school, and higher education levels, as well as in youth organisations and among the adult population;[28]

- Making appropriate use of targeted funding, promotional activity and other methods, such as reaching out to (potential) learners;

- Promoting the role of information, guidance and counselling providers working directly with voluntary/community organisations to raise awareness of the individual/social/economic benefits of learning, and to encourage diversification of studies and non-traditional career/learning choices;

- Enterprises should be facilitated to become learning organisations, where everyone learns and develops through the work context, for the benefit of themselves, each other and the whole organisation, with such efforts being publicised and recognised;

- Encouraging public service providers, voluntary and community groups, employers and trade unions to develop and/or promote learning opportunities tailored to their particular constituencies and, e.g. disabled people.

Striving for excellence

Strategies must adopt mechanisms to maximise the quality of the learning experience itself and also of the policy/implementation processes and services associated with learning. Quality is not just an obligation but also a motivating factor in decisions by individuals, employers and others to invest in learning. Mechanisms should include:

- Ambitious targets for, among others, participation, resourcing, retention and learning outcomes. Progress against these targets should be monitored by reference to pre-defined indicators. Data should be broken down by gender and other socio-economic factors;

- Robust quality assurance tools for formal and non-formal learning (e.g. international and national standards and guidelines, inspection systems, quality awards, financial instruments);

- Evaluation exercises in which strategies themselves are assessed against criteria for comprehensiveness and coherence and against national/common targets and agreed indicators;[29]

- Regular assessment/revision of strategies to maintain relevance, effectiveness and complementarity with strategies at other levels.

3. PRIORITIES FOR ACTION

Each 'priority for action' relates closely to a number of the strategic building blocks set out in the previous section, and each contributes to fulfilling the broad objectives and principles set out in section 1.4. They have been developed according to feedback from the consultation, results and evaluation of existing policies and instruments at European level and the Commission's own policy analysis. They are presented under the six 'key messages', which were at the heart of the Memorandum. The messages – modified slightly to take account of detailed comments – were endorsed by the consultation. The order in which the priorities are presented reflects the level of implementation they are intended to support: the first three principally concerning the European dimension of lifelong learning, the second three requiring greater involvement of actors at the national, regional and local level, with adequate support at European level. Annex I sets out further supporting proposals in relation to research and evaluation.

3.1. Valuing learning

These proposals principally contribute to or involve *'creating a learning culture'*, *'facilitating access to learning opportunities'* and *'striving for excellence'*.

Creating a culture of learning requires that the question of how to value learning in formal, non-formal and informal settings, must be addressed in a coherent way.[30] Enabling citizens to combine and build on learning from school, universities, training bodies, work, leisure time and family activities presupposes that all forms of learning can be identified, assessed and recognised. A comprehensive new approach to valuing learning is needed to build bridges between different learning contexts and learning forms, and to facilitate access to individual pathways of learning. All contributions to the consultation stressed that progress in this field, particularly in relation to non-formal and informal learning, will be a crucial step towards a European area of lifelong learning, building on the existing right of free movement within the European Union and making the concept of citizenship more concrete.

Substantial work has already been done at national and European level to facilitate the transfer and mutual recognition of formal qualifications. For example, the Council and the European Parliament have adopted a Recommendation on mobility for students, persons undergoing training, teachers and trainers, and Member States have agreed to an action plan[31]. In addition, a set of Directives has been produced, designed to guarantee the recognition of qualifications to ensure access to regulated professions in different Member States. This has not, however, led to a comprehensive framework supporting the overall transfer of qualifications and competences, either between levels of formal education and training or across institutional, sectoral and national borders. It is essential that learning providers, employers and social partners are involved in the development of instruments for valuing learning, and that all those involved, including individual users, find methodologies and systems valid, reliable and legitimate. Instruments should also be introduced to help citizens – young people as well as adults – present their qualifications and competences anywhere in Europe in a transparent manner.

Valuing formal diplomas and certificates

- The Commission, the Member States and the social partners will jointly examine the role and character of voluntary minimum quality standards in education and training. The development of such standards, accompanied by a peer-review approach, would increase the transparency and coherence of national education and training systems, creating a stronger basis for mutual trust and recognition of qualifications[32].

- The Commission will develop by the end of 2002, a guide to, and glossary of, the Community instruments related to transparency of diplomas and certificates to make it easier to find and make use of them. (E.g. the European Credit Transfer System, Diploma and certificate supplements, Europass, the European CV-format, various Internet services).[33]

- The Commission is proposing, by the end of 2001, a more uniform, transparent and flexible regime for professional recognition (in the field of regulated professions). Member States should, in co-operation with the Commission, ensure that citizens have access to updated and relevant information on these directives and on questions of recognition in general. European networks involving national contact points on professional recognition, such as NARIC[34] and NRCVG[35], should play a central role here.

- The Commission will, in co-operation with the Member States and higher education institutions, actively support the 'Bologna process' in the field of Higher Education. Experiences from this process will be used as a basis for promoting closer co-operation within other areas, such as vocational education and training.

- The Commission will, in close co-operation with the Member States, higher education institutions, professional associations and the social partners, support the voluntary development and implementation of European diplomas and certificates, and criteria to be met by them. This applies both to initiatives in higher education and to initiatives from industry.

Valuing non-formal and informal learning; Exchange of experience

- The Commission will initiate by the end of 2002 a systematic exchange of experience and good practice in the field of identification, assessment and recognition of non-formal learning. The European Forum on the Transparency of Qualifications, managed by the Commission and Cedefop, should co-ordinate this process, in close co-operation with the Member States, the social partners, non-governmental organisations, OECD, Cedefop, Eurydice and the European Training Foundation (ETF).

- Parallel to action at European level, Member States should involve all relevant players, including providers of non-formal learning, the social partners, representatives of formal education (vocational as well as higher), and NGOs representing excluded groups, in developing methodologies and standards for valuing non-formal and informal learning.

- The Commission will establish by the end of 2003, based on the systematic exchange of experience, an inventory of methodologies, systems and standards for the identification, assessment and recognition of non-formal and informal learning. It should target the international, national, and sectoral levels, as well as enterprises. The Commission will use this inventory to support and stimulate the development of high quality assessment methodologies and standards at European, national and sectoral levels.
- Members States will be encouraged to provide the legal framework to implement more widely the identification, assessment and recognition of non-formal and informal learning. Member States should consider an individual right to assessment.
- Member States should encourage Universities, education/training institutions and other relevant organisations (e.g. research institutions) to systematically implement measures aimed at the assessment and recognition of non-formal and informal learning.

New instruments at European level to support valuing all forms of learning[36]

- The Commission will develop, by the end of 2002, a 'portfolio' system which will enable citizens, at all stages of education and training, to group together their qualifications and competences and present them. This will be built on existing experience, including the European CV (which serves as a 'summary' of qualifications and competences) requested by the Lisbon European Council.
- The Commission will by 2003, in co-operation with the Member States, develop a 'modular' system for the accumulation of qualifications, allowing citizens to combine education and training from various institutions and countries. This will build on the European Credit Transfer System (ECTS) and Europass[37].

3.2. Information, guidance and counselling

These proposals principally contribute to or involve: *'facilitating access to learning opportunities'*, *'creating a learning culture'* and *'partnership working'*.

The consultation feedback confirmed the crucial role that information, guidance and counselling should play both in facilitating access to learning and in motivating potential learners. Open dialogue between guidance systems, lifelong learning provision at all levels and labour market actors is a prerequisite for fulfilling this role. Guidance services should promote equal opportunities by being accessible to all citizens, especially those at risk of exclusion, and tailored to their needs through systems that are coherent, cohesive, transparent, impartial and of high quality. ICT based services, in partnership with other local level services, e.g. libraries, may serve as access points. Systems must also be flexible, and adaptable to the changing needs of the individual learner – bearing in mind the value of guidance for personal fulfilment, as well as the needs of the labour market and the wider community. To this end, existing resources should be evaluated in order to ensure transparency and coherence of provision, and networks of services should also be developed in order to overcome existing boundaries. The consultation recommended partnership at

European level to improve the exchange of ideas and good practice in this field. Promoting real active citizenship and mobility assumes that counsellors are able to deal with other countries' education, training and guidance systems, labour market systems and programmes.

Strengthening the European dimension of information, guidance and counselling

- The Commission will launch by 2002 an Internet portal on learning opportunities, providing information on lifelong learning in Member States and candidate countries. The Commission invites the Member States to ensure the availability of relevant national online databases, which can be interconnected through the portal.[38]

- The Commission will set up by the end of 2002 a European Guidance Forum, involving representatives of all relevant players, to encourage dialogue, exchange of good practice and the identification of solutions to common problems. Building on the review on guidance, which is taking place in the Member States and candidate countries, and in cooperation with the OECD, the Forum should develop a common understanding of basic concepts and underlying principles of guidance. It should then focus on specific issues such as the definition of principles, quality of delivery, consumer interest/involvement, the effectiveness of tools and practices, the training of guidance workers, and how best to meet the needs of groups at risk of exclusion. The Forum will also undertake reflection on the quality of guidance provision, with a view to developing common guidelines and quality standards for guidance services and products.

- The Commission will, by the end of 2003, examine existing European networks and structures in the field of information, guidance and counselling (e.g. Euroguidance, EURES, Eurodesk, Fedora, EQUAL, Mobility Centres for Researchers) for both education and training, with a view to establishing a coherent and cross-sectoral lifelong learning framework for the scope and activities of these networks.[39]

3.3. Investing time and money in learning

These proposals principally contribute to or involve: *'adequate resourcing'*, *'facilitating access to learning opportunities'* and *'striving for excellence'*.

A strong consensus emerged from the consultation that overall investment levels need to be raised significantly in order to respond to the transition to the knowledge-based society, and that spending on learning should be highlighted and reported in the same way as spending on more tangible forms of capital. Clearly, a key aspect of investment in lifelong learning will continue to be that of public expenditure, since formal provision in the school, vocational, adult and higher education sectors, as well as increasingly in the pre-school sector, must remain vital cornerstones of any lifelong learning strategy. Responsibility for raising investment is also shared by the social partners, for instance in respect of employers providing suitable access to learning. 35 hours of learning per year for every employee might be an attainable benchmark. Ensuring value for money and quality in terms of outputs is as important as ensuring adequate resourcing. The need to facilitate access to individual pathways of learning

and to foster a culture of learning implies that more resources should be directed towards guidance and counselling, new ways of valuing learning and making learning available in a wider range of environments, with appropriate facilities (e.g. for childcare). Likewise, more resources are called for in respect of non-formal learning, especially for adult and community learning provision. Respondents underlined the need to give priority in resource allocation to learning for children in pre-school education (to reduce inequalities later on and to lay a solid basis for further learning), to teachers, trainers and other learning facilitators (to prepare them for their evolving roles – see section 3.6), and to senior citizens, including older workers, (to give them opportunities to participate more actively in society and in the labour market, including the role they can play in intergenerational learning)[40]. There is certainly no top-down solution on how to bring about fundamental reform, while reconciling the need both to increase overall levels of investment and, at the same time, reduce inequalities in resource allocation. Hard choices will have to be made.

Raising levels of investment and making investment more transparent

- The Commission calls on
    - the European Investment Bank, in the framework of its policy directed to the promotion of human capital development, to seek to support the implementation of lifelong learning as described in this Communication, e.g. through funding infrastructure for teachers' training and local learning centres, multimedia learning software and content and training programmes developed by enterprises;[41]
    - the European Bank for Reconstruction and Development and the European Investment Bank to invest in the development of lifelong learning, for example of infrastructure and SMEs, in the candidate countries of Central and Eastern Europe;
    - the European Investment Fund to examine how best to use its instruments to promote the emergence of venture capital funds dedicated to supporting the development of human capital aiming e.g. to favour SMEs' access to learning.
- Member States should set national targets to raise overall investment levels in human resources, in line with the Lisbon European Council conclusions and the Employment Guidelines[42]. Such target setting should be carried out in a transparent manner, in relation to how resources are allocated. This should also take into account the respective roles to be played by government, employers, individuals and other actors. In addition, Member States should set targets to increase participation in further education and training, indicating the increase in participation that they expect to achieve by gender, age group, educational attainment and target groups.
- Member States are invited to develop further their use of the European Social Fund (ESF) – already the main Community instrument for the funding of lifelong learning, and the EQUAL Community Initiative to support the implementation of lifelong learning, in particular for the development of local learning partnerships and centres, and to support learning opportunities at work, access to basic skills

(including through 'second chance provision'), and training of teachers, trainers and other learning facilitators[43].

- The Commission will develop indicators and other tools to measure the impact of ESF programmes on lifelong learning and will support the evaluation of the implementation of lifelong learning activities funded by the ESF, as part of the mid-term review of the Fund, which is due at the end of 2003.

- The social partners are invited to negotiate and implement agreements at all appropriate levels to modernise the organisation of work[44], with a view to increasing investment in lifelong learning and to providing more time for learning. For example, they should work towards the recognition of all learning activities, including non-formal and informal learning, and integrate this into all aspects of human resource policies and practices at the enterprise level.

Providing incentives and enabling investment

- The Commission will evaluate various models of individual funding schemes (e.g. 'individual learning accounts') to assess their impact on investment, participation in learning and on learning outcomes. This evaluation will take full account of the work done by the OECD in this field and an evaluation report will be presented by the end of 2002.

- The Commission will propose that research into the benefits, costs and returns of investing in learning, building on current research[45], be supported under the 6th Research Framework Programme[46].

- The Commission will produce, based on information provided by the Member States, an overview of fiscal incentives available for learning financed by individuals and companies with a view to the identification and adoption of good practice.

Ensuring high quality returns and outcomes of investment

- The Commission will, by the end of 2003, in cooperation with the Member States, develop guidelines and indicators on quality aspects of lifelong learning[47], and support policy development in Member States through exchanges of good practice and peer review.

3.4. Bringing together learners and learning opportunities

These proposals principally contribute to or involve: *'creating a learning culture'*, *'partnership working'* and *'insight into demand for learning'*.

The consultation feedback emphasised the importance of adequate levels of open and flexible education and training provision at the local level for bringing learning and (potential) learners together, and the role of local guidance services in mediating this. Here the need to promote a balance between non-formal learning in the workplace and in social surroundings/environments is particularly relevant, reflecting the balance of objectives of lifelong learning between active citizenship, personal fulfilment, employability and social inclusion. Many reports referred to the value of learning

opportunities (often non-formal or informal), provided by adult education or the voluntary sector, including NGOs and local community organisations. Non-formal education projects in the youth field, for example, increase the chances of young people participating in society, and acquiring tolerant and democratic values. To promote a culture of learning across Europe, there is a need to develop learning communities, cities and regions and to establish local multifunctional learning centres.[48] Consultation feedback also often focused on innovative learner-centred learning and teaching methods and the potential for ICT, with appropriate support, to help bring learning to the learner. For the purposes of this document, ICT-related issues are addressed under section 3.6.

Encouraging and supporting learning communities, cities and regions and setting up local learning centres

- Member States are invited to use the resources of schools, adult education and higher education institutions, research institutions and other public facilities such as libraries, as multipurpose centres for lifelong learning.

- Youth organisations should regularly make visible and publicise the outcomes of non-formal and informal education that result from their activities.

- Member States are invited to develop further their use of the European Regional Development Fund (ERDF) and the ESF to support the implementation of lifelong learning, as an integral part of local and regional development programmes, and to support the improvement of ICT skills by workers, especially those in SMEs.

- The Commission invites the Committee of the Regions, possibly with the involvement of European and national associations of local and regional levels, to promote the implementation of lifelong learning at the local and regional levels, in particular to:

    - develop links between local and regional learning centres across Europe through twinning agreements, and the use of ICT with a view to exchanging experience and building bridges between all forms of learning;

    - organise, together with the Commission, a campaign at local and regional level in order to promote and publicise the most effective approaches to lifelong learning.

- The Commission will support through its programmes the establishment of networks between those regions and cities with well-developed lifelong learning strategies, to facilitate the exchange of experience and good practice.

It is essential to promote more actively the development of learning at the workplace and for enterprises and other organisations to become learning organisations. The social partners have a key role to play to make this vision a reality, as well as to ensure equal opportunities and access to learning at enterprise level for all employees, taking into account the need to facilitate the reconciliation of work, family life and other caring responsibilities. Gaining insight into the learning needs of SMEs, where learning typically takes place in a non-formal or informal context, is particularly

important[49]. Provision has to be flexible, high quality, and tailored to individual firms. Learning providers, e.g. higher education institutions, should offer courses tailored to their specific needs. SMEs themselves also need to explore fully how to facilitate access to learning (e.g. in partnership with other enterprises through learning networks and competence sharing, and in cooperation with guidance services). The Commission Communication "Helping SMEs to GoDigital" is, in this context, contributing to providing ICT skills for SMEs[50].

Encouraging and supporting learning at the workplace - including in SMEs

- The social partners, at all levels, are invited to agree that each employee should have an individual competence development plan, based on an assessment of his/her individual competences, and in accordance with overall competence development plans at the enterprise level. Such schemes should fully take into account the particular needs and circumstances of SMEs and should provide expert advice on how to assess competence and learning needs. The social partners should also help to raise awareness about the importance of learning and encourage and train employees and managerial staff to act as learning facilitators or mentors for others.

- The Commission encourages the European social partners to finalise, under the social dialogue process, a framework, including common goals, in order to promote lifelong learning at all levels and especially at enterprise level. The Commission invites the social partners to promote such a framework at national level through their respective organisations, according to national practices.

- The Commission will, by the beginning of 2003, launch an award for enterprises that invest in lifelong learning, in order to reward and publicise good practice in this area[51].

3.5. Basic skills

These proposals principally contribute to or involve: *'insight into demand for learning'*, *'creating a learning culture'* and *'facilitating access to learning opportunities'*.

The European Councils in Lisbon and Stockholm underlined the importance of improving basic skills through adequate education and lifelong learning policies. Basic skills include the foundation skills of reading, writing and mathematics, as well as learning to learn and the new skills set out at Lisbon – IT skills, foreign languages, technological culture, entrepreneurship, social skills. The consultation feedback underlined the fundamental importance of basic skills acquisition in allowing people to engage in further learning and as a basis for personal fulfilment, active citizenship and employability, particularly given the demands of the developing knowledge-based society. The foundations for lifelong learning must be provided by Governments through compulsory schooling, but adults who left school with ongoing literacy, numeracy and other basic skills needs should also be encouraged to participate in compensatory learning.

Identifying what the basic skills package should be

- The Commission will invite the 'Sub-Group' set up following the Report on the Concrete Objectives of Education and Training Systems also to address basic skills provision outside the formal education and training systems as well as basic skills acquisition by adults, motivation to learn and how to include basic skills, particularly social, personal, ICT and scientific skills provision, in curricula without overloading them[52].

Making basic skills genuinely available to everyone and in particular to those less advantaged in schools, early school leavers and to adult learners[53]

- The Charter of Fundamental Rights recognises the right to education, including the right to receive free compulsory education, and access to vocational and continuing training[54]. To make this right more concrete, Member States should consider extending the right to compulsory education so that it covers free access to basic skills for all citizens, regardless of age.

- Member States should ensure that young people acquire basic digital literacy as part of compulsory education, and should also expand digital literacy initiatives to citizens at risk of exclusion[55]. Member States should provide the opportunity for unemployed people to get a recognised certificate of basic ICT skills.

- The social partners are invited to conclude agreements on the promotion of access to learning opportunities, in particular for workers with low levels of skills and older workers, to meet the objective of giving every worker the opportunity to achieve information society literacy by 2003[56].

- The Commission invites NGOs at European level to identify factors that prevent or promote the acquisition of basic skills and participation in mainstream lifelong learning for citizens at risk of exclusion. This should serve as a basis for developing adequate policy responses, at the appropriate level, including 'flexible learning', targeted learner-centred actions, support for community education projects for people from disadvantaged neighbourhoods and groups, and the provision of care services for children and other dependants.

3.6. Innovative pedagogy

These proposals contribute to or involve: *'insight into demand for learning' 'partnership working'* and *'striving for excellence'*.

The consultation feedback emphasises a shift from 'knowledge' to 'competence' and from teaching to learning, placing the learner at the centre. Such a shift implies that as early as the pre-primary stage people 'learn how to learn'. Learners should, as far as possible, actively seek to acquire and develop knowledge and competences. Different methods are called for depending on the situation of the learner, the learning facilitator and the setting (e.g. community centres, workplace, the home). Work-based learning, project-oriented learning and learning organised as 'study circles' are particularly useful approaches. New teaching and learning methods challenge the traditional roles and responsibilities of teachers, trainers and other learning

facilitators. There is, therefore, a strong need to develop their training, including in multi-cultural competences, to ensure that they are ready and motivated to face the new challenges, and therefore to promote tolerance and democratic values. This should also include further reforming and improving pedagogical approaches in formal, as well as non-formal learning. The exchange of experience between schools, adult education and voluntary organisations, ethnic minority centres, universities and companies should provide insight into learning needs in this area. Higher education, and research institutions, for example, should introduce or increase research and training in the field of lifelong learning. All contributions recognise that ICT-supported learning offers great potential for rethinking and redesigning learning processes, whilst also recognising the risk of new technology creating a 'digital divide'. The eLearning initiative and the eLearning Action Plan address a number of important issues in this area, in the context of coordinating Member States' efforts to adapt education and training systems to the information society[57]. Many reports stress that ICT based learning should be combined with other, more social modes of learning (e.g. learning groups, family learning, tutoring or collaborative learning at work) and regular individual and technical support services. In a rapidly growing market, quality and relevance of learning material, services and learning processes is important, particularly in terms of consumer protection, motivation and effective use of resources[58].

New teaching and learning methods and the new role of teachers, trainers and other learning facilitators

- The Commission will support, through the Socrates and Leonardo da Vinci programmes, the development of a network for the training of teachers and trainers. Based on existing networks, e.g. in Cedefop, this will aim to analyse and exchange innovative experience in formal and non-formal contexts, while creating the conditions for transfer within the Community. It will also contribute to the construction of a common framework of reference for the competences and qualifications of teachers and trainers and respond to the challenges of ICT based learning. Member States, local and regional authorities, learning providers, teachers' representatives and NGOs, including those active in non-school youth education, should contribute to this by making development opportunities accessible to learning facilitators from other Member States and candidate countries. Particular attention will be given to improving training in sectors such as adult education, where formal training of teachers is not yet a requirement in all Member States and where the need to improve teaching quality is, therefore, a particular priority.

- Given the importance attributed to non-formal and informal learning, the role of learning facilitators must be supported. Social partners, NGOs (e.g. youth organisations), and others, should, in cooperation with the Commission and the Member States, initiate the systematic exchange of experiences in this field.

- The Commission will propose that research and experimentation into how we learn in the contexts of formal, non-formal and informal learning, and how ICT can be integrated into these learning processes, be supported under the 6th Research Framework programme, through the Leonardo da Vinci, Socrates and Youth programmes and the eLearning pilot actions, the Information Society Technologies

Programme[59] and through the EQUAL Community Initiative. This should promote the development of efficient and effective pedagogic approaches for various groups of learners, including underrepresented groups/non-traditional learners.[60]

- The Commission will, by 2003, in cooperation with the Member States, social partners and international NGOs, develop European quality recommendations aiming at learning organisations outside formal education and training, to be used on a voluntary basis. A European label should be given those organisations complying with these recommendations.

ICT enabling and supporting lifelong learning

- The Commission, in close cooperation with the Member States, will examine approaches at national level to developing seals of quality for ICT based learning and teaching material, in particular learning software, with a view to their possible development at European level to ensure coherence and consumer protection.

- The Commission will continue to support projects under the Socrates and Leonardo da Vinci programmes, and the eLearning initiative, to develop ICT based learning with a European dimension, e.g. through the setting up of transnational 'virtual study circles'.

4. DRIVING FORWARD THE AGENDA

4.1. A lifelong learning framework

Member States are fully responsible for the content and organisation of their own education and training systems[61], and it is not the EU's role to harmonise laws and regulations in these fields. At the same time, however, there are specific policy functions relating to lifelong learning, which are dealt with at European level. In addition to implementing a vocational training policy[62] the Treaty provides for a key role for the Community in enhancing the quality of education through European cooperation in this field. The European Union has a particular role to play in relation to: citizenship, freedom of movement, whether for the purposes of learning or employment, the development of European labour markets[63] and the coordination of employment and social inclusion policy. Transnational education, training and working are, for some citizens, already a reality. Despite this, obstacles still remain to learning, working and living in Member States other than one's own.

There is, therefore, a substantial role to be played by the European Union and by cooperation between the Member States in supporting and stimulating the implementation of lifelong learning across the Community. At the same time, policy interventions need to be adapted to local and national circumstances, given the diversity in education, training and labour market systems across Europe. The key challenge, therefore, is to ensure that Member States remain free to develop their own coherent and comprehensive strategies, and to design and manage their own systems, while moving broadly in the same direction. This must be done in a coherent, coordinated and economical manner. Where the EU has no legislative competence and where Treaty objectives are not covered by existing Treaty-based processes, the following methods, which include the open method of coordination, will be used:

- the identification of shared problems, ideas and priorities, through the exchange of knowledge, good practice and experience and through peer review, to enable actions to be developed across all or certain Member States and/or by European instruments and processes;

- increasing the transparency of policies and systems, enabling citizens to access and make full use of the institutions and services at their disposal;

- ensuring complementarity and synergy at European level between the various processes, strategies and plans involved in implementing lifelong learning;

- developing synergy between Member States' policy in the field of lifelong learning.

The Commission will develop by the end of 2003 a database on good practice, information and experience concerning essential aspects of lifelong learning at all levels to support the implementation of lifelong learning. Cases will be selected in accordance with clear criteria and structured on a thematic basis and by actor. The database will not only include cases emanating from Community instruments (education, training and youth programmes, ESF, ERDF and Community Initiatives) but also from the national, regional, local and sectoral levels, non-Member States, international organisations, social partners and civil society. This database will be built on existing initiatives, based on dialogue with all actors, accessible on the Internet and kept fully up to date and relevant to current needs.[64]

4.2. Building on achievements at European level

The implementation of lifelong learning, including the priorities for action identified in section 3, will be through existing processes, instruments and programmes[65]:

- The work programme on the Follow-up to the Report on the Concrete Objectives of Education and Training Systems will be one of the principle means for the strengthening of cooperation and exchange of good practice among Member States in the field of lifelong learning;

- The priorities for action in this Communication that relate to employment-related aspects will be taken into account in the negotiations of future rounds of the European Employment Strategy and will also be addressed in the Action Plan on Skills and Mobility. Similarly, the priorities for action relating to social inclusion and equal opportunities aspects of lifelong learning will be taken into account in the development of the European Social Agenda;

- A wide range of projects and other actions focused on lifelong learning will be promoted and supported through existing Community programmes and actions. The Socrates, Leonardo da Vinci and Youth programmes have a major role to play here. The Commission will substantially reinforce and expand the joint actions that support projects coming within the scope of more than one of these programmes, and will facilitate the more active participation of NGOs and SMEs under the programmes. Certain priorities will also be implemented as part of the eLearning Action Plan;

- The European Social Fund is the main Community instrument for funding lifelong learning. The European Regional Development Fund is also an important funding stream. The Commission, working with the Member States, will ensure that the 2003 review of both streams of funding, as far as lifelong learning is concerned, takes account of the priorities identified in the present text. The EQUAL Community Initiative will also play a crucial role in developing new approaches to lifelong learning;

- The 6th Research Framework Programme will provide new opportunities to reinforce research in the area of lifelong learning, and thus build on the insights gained in this field under previous programmes. This research will be undertaken primarily under Priority 7 ('Citizens in an Evolving Knowledge Society')[66] . (Priorities for research as well as further evaluation are listed in Annex 1).

4.3. Indicators[67]

Comparable information and statistical measures are essential to the development and implementation of coherent and comprehensive lifelong learning strategies. Statistics and indicators already form an essential part of existing initiatives in the field of lifelong learning with a view to monitoring progress both in achieving identified targets and in implementing policy objectives.

Some key indicators are already available. The 2001 Communication on Structural Indicators[68] proposes three indicators related to lifelong learning. These concern[69] investment, participation and early school leavers. Together with these, another five existing indicators[70] provide measures to monitor progress within three of the above 'priorities for action' areas concerning *investing time and money in learning*, *basic skills* and *innovative pedagogy* (eLearning[71] is particularly relevant to this priority).

Additional indicators[72] are currently being developed in the context of the European Employment Strategy[73], the European Social Agenda[74], the Communication on quality in work[75] and the Follow-up to the Concrete Objectives Report. Moreover, the Task Force on Measuring Lifelong Learning[76] established an overall framework for extending the statistical information in the field of lifelong learning and launched a process aimed at revising statistical methodologies in order to identify the additional sources in this field that need to be developed at EU level in the short- and medium-term. In addition, following consultation of experts from 36 European countries[77], some areas have been identified for developing indicators on the quality of lifelong learning.

The development of a limited number of new indicators will be based on the learner-centred approach in relation to formal, non-formal and informal learning. In particular, this work will aim to fill the gaps on several aspects of lifelong learning, by proposing quantitative information collections directly from learners. It will also promote the development of qualitative information sources, in particular in the fields of assessment and recognition; information, guidance and counselling; and training of teachers and trainers[78]. This work will complement the development of indicators on lifelong learning related to employability, adaptability and social inclusion, in the context of the European Employment Strategy and the European Social Agenda.

The overall coordination and coherence of the development of new indicators will, in principle, be overseen through the network of 'sub-groups' formed to follow up the Report on the Concrete Objectives of Education and Training Systems. The sub-groups will also play a valuable role in the identification of good practice for dissemination among Member States.

The Member States and other European countries are invited to support this work. In particular, in the context of their cooperation within the European Statistical System (ESS), Member States and other European countries should aim to make their own statistics and indicator systems as comparable as possible. In developing new indicators, the Commission will draw on existing national and international sources, particularly in collaboration with the OECD. Maximum use will be made of existing sources and structures within the ESS, as well as other available resources, including the Working Party on Education and Training Statistics, which will have responsibility for technical aspects, as well as other available resources.

4.4. Maintaining the momentum

The creation of a European area of lifelong learning will need to be supported by innovative forms of partnership, cooperation and coordination at all levels between the actors involved in implementation. The wide-ranging consultation on the Memorandum provided the opportunity to set up for the first time a whole series of coordination and consultation structures. These represent the broad spectrum of lifelong learning sectors and interests not only at European level but also in the Member States, in the EEA and candidate countries, at the regional level and within and between European NGOs, other representatives of civil society and the social partners. The Commission proposes that, in accordance with its White Paper on Governance, these innovative and dynamic structures be built upon in order to ensure that the momentum created since the Memorandum is maintained at all levels:

- The development of policy at European level and the coordination of national policies requires the establishment of a high-level group of senior representatives of Ministries bearing the main responsibility for lifelong learning. This group will help to ensure the complementarity of measures developed in the field of lifelong learning, including the implementation of the work programme for the Follow-up of the Report on the Concrete Objectives of Education and Training Systems, with related processes, strategies and plans at European level. As such, the scope of its responsibilities will need to span all aspects of lifelong learning (schools, higher education, adult education, vocational training, non-formal youth learning etc.). The group of national lifelong learning coordinators set up for the European wide consultation, and the 'sub-groups', that were set up as part of the Concrete Objectives Follow-up, will provide support to the high level group.

- Member States, the EEA and candidate countries should prolong and, where necessary, strengthen and expand established interministerial coordination structures to promote internal policy coherence. In general, consultation networks on lifelong learning should be built on at all levels, national, regional and local, to support implementation.

- The Commission will develop further its consultation of the social partners in the field of lifelong learning. In addition, the Commission would welcome further

reflection and contributions from the social partners on the priorities set out in this Communication, through the social dialogue process.

- The Commission will also develop the existing consultation platform with civil society and the NGOs concerned by lifelong learning. It will verify that the composition of this consultation platform is sufficiently representative of the various actors as well as groups at risk of exclusion.

- The working platforms provided by the European Forum on Transparency, the European Forum on Quality and the proposed European Forum on Guidance should define the scope of their respective areas with a view to working together, and with the sub-groups set up as part of the Concrete Objectives Follow-up, in the future.

- The Commission will encourage Cedefop, Eurydice and ETF to build upon their existing cooperation in relation to lifelong learning, in particular to support the development of the lifelong learning database (see section 4.1).

- The Commission will continue to cooperate actively with international organisations such as the OECD, the Council of Europe and UNESCO when developing lifelong learning policy.

5. NEXT STEPS

The next stages along the path towards a European area of lifelong learning will be:

- An examination and discussion of this document by the European Parliament, the Economic and Social Committee and the Committee of the Regions, leading to an Opinion from each institution;

- Endorsement of the main principles and proposals of this Communication and the approach suggested in respect of a European area of lifelong learning by the Council (Education and Youth Council and the Employment and Social Policy Council) during the Spanish Presidency;

- A contribution by the Commission on this subject to the Barcelona Spring Council of 15-16 March 2002;

- A report by the Commission to the European Council and the European Parliament on progress towards implementing the lifelong learning framework by the end of 2003.

ANNEX I: PROPOSALS IN RELATION TO RESEARCH AND EVALUATION (BY THE END OF 2003)

- The Commission will propose that research into the benefits, costs and returns of investing in learning, building on current research[79], be supported under the 6th Research Framework Programme[80].

- The Commission will propose that research and experimentation into how we learn in the contexts of formal, non-formal and informal learning, and how ICT can be integrated into these learning processes, be supported under the 6th Research Framework programme, through the Leonardo da Vinci, Socrates and Youth programmes and the eLearning pilot actions, the Information Society Technologies Programme[81] and through the EQUAL Initiative. This should promote the development of efficient and effective pedagogic approaches for various groups of learners, including underrepresented groups.[82]

- The Commission will launch a feasibility study on a framework for the recording of public and private levels of investment in lifelong learning, at the national, regional and enterprise levels, with a view to enhancing transparency. This will be based on data provided regularly, for example on the resource allocation between formal, non-formal and informal learning and between various sectors of learning provision (broken down by gender, age group, previous educational attainment and target groups).

- The Commission, in cooperation with the social partners at European level, will launch a survey on learning in SMEs with particular focus on non-formal and informal learning, including quality and output aspects.

- The Commission will support an evaluation, based on case studies, of what factors are likely to make lifelong learning partnerships efficient and sustainable.

- The Commission will undertake a feasibility study on an EU-wide approach to the development of a basic skills and adult literacy survey to be carried out on a regular basis.

- The Commission will evaluate existing mechanisms providing individual rights to basic skills and/or lifelong learning and their impact on participation in learning opportunities.

- The Commission will, building on existing evidence,[83] identify barriers to participation in lifelong learning for under-represented groups (resource-related or financial barriers, including lack of childcare, transport or access to learning support material) and key factors contributing to eliminating such barriers.

- In addition to the above proposals, the Commission will support broader research across the field of lifelong learning, including through the Information Society Technologies Programme of the 6th Research Framework Programme.

ANNEX II : GLOSSARY

This glossary provides explanations of some of the key terms used in this Communication

active citizenship

The cultural, economic, political/democratic and/or social participation of citizens in society as a whole and in their community.

adaptability[84]

The capacity to adapt to new technologies, new market conditions and new work patterns of both enterprises and of those employed in enterprises.

assessment

A general term embracing all methods used to appraise/judge the performance of an individual or a group.

certificate/diploma

An official document, which formally records the achievements of an individual.

certification

The process of issuing certificates or diplomas, which formally recognise the achievements of an individual, following an assessment procedure.

civil society

A 'third sector' of society alongside the state and the market, which embraces institutions, groups, and associations (either structured or informal), and which may act as mediator between the public authorities and citizens.[85]

compensatory learning

The provision of learning which should have been acquired during compulsory schooling.

competence

The capacity to use effectively experience, knowledge and qualifications.

corporate social responsibility

The commitment of a corporate organisation to operate in a socially, economically and environmentally sustainable manner, while acknowledging the interests of internal and external stakeholders.

digital divide

The gap between those who can access and use information and communication technologies (ICT) effectively, and those who cannot.

digital literacy

The ability to use ICT proficiently.

eLearning

Learning that is aided by ICT.

employability[86]

The capacity for people to be employed: it relates not only to the adequacy of their knowledge and competences but also to the incentives and opportunities offered to individuals to seek employment.

empowerment

The process of granting people the power to take responsible initiatives to shape their own life and that of their community or society in economic, social and political terms.

European governance

The administration of European affairs through the interaction of the traditional political authorities and 'civil society', private stakeholders, public organisations, citizens.

formal learning

Learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner's perspective.

guidance

A range of activities designed to assist people to make decisions about their lives (educational, vocational, personal) and to implement those decisions.

identification (of competences)

The process of specifying and defining the boundaries and nature of competences.

informal learning

Learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or "incidental"/random).

intergenerational learning

Learning that occurs through the transfer of experience, knowledge or competences from one generation to another.

knowledge-based society (*or* knowledge society)

A society whose processes and practices are based on the production, distribution, and use of knowledge.

learning community

A community that widely promotes a culture of learning by developing effective local partnerships between all sectors of the community and supports and motivates individuals and organisations to participate in learning.

learning facilitator

Anyone who facilitates the acquisition of knowledge and competences by establishing a favourable learning environment, including those exercising a teaching, training or guidance function. The facilitator orientates the learner by giving guidelines, feedback and advice throughout the learning process, in addition to assisting the development of knowledge and competences.

learning organisation

An organisation that encourages learning at all levels (individually and collectively) and continually transforms itself as a result.

learning region

A region in which all stakeholders collaborate to meet specific local learning needs and implement joint solutions to common problems.

lifelong learning

All learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective.

lifewide learning

All learning activity whether formal, non-formal or informal. Lifewide learning is one dimension of lifelong learning as defined in this Communication.

non-formal learning

Learning that is not provided by an education or training institution and typically does not lead to certification. It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's perspective.

recognition of competences

1) The overall process of granting official status to competences, (this is *formal recognition*), gained either

- formally (by awarding certificates) or

- in a non-formal or informal setting (by granting equivalence, credit units, validation of gained competences);

and/or

2) The acknowledgement of the value of competences by economic and social stakeholders (this is *social recognition*).

social inclusion

When people can participate fully in economic, social and civil life, when their access to income and other resources (personal, family, social and cultural) is sufficient to enable them to enjoy a standard of living and quality of life that is regarded as acceptable by the society in which they live and when they are able fully to access their fundamental rights.

valuing learning

The process of recognising participation in and outcomes of (formal, non-formal or informal) learning, so as to raise awareness of its intrinsic worth and to reward learning.

[1] Source: Labour Force Survey (LFS) 2000

[2] "The well-being of nations: the role of human and social capital" (p. 33) Tom Healy, Sylvian Côté; OECD 2001.

[3] For most Member States, LFS participation refers to education and training participation by 25-64 year olds in the four weeks prior to the survey. For Portugal, France and the Netherlands, however, data are collected only if participation is on-going at the time of the survey.

[4] Source: OECD; direct and indirect expenditure on educational institutions from public and private sources, 1998

[5] Feira European Council conclusions para. 33

[6] Council Conclusions of 20 December 1996 on a strategy for lifelong learning (97/C 7/02).

[7] Summary and analysis reports of the feedback from the Member States, EEA countries, candidate countries and civil society are available.

[8] Education Council Decision of 14 February 2001 based on a Commission proposal (COM(2001) 59 final). The Objectives Report was endorsed by the Stockholm European Council in March 2001.

[9] Communication from the Commission: Draft detailed work programme for the Follow-up of the Report on the Concrete Objectives of Education and Training Systems COM(2001) 501 final.

[10] Stockholm European Council conclusions: para. 11.

[11] In accordance with the Amsterdam treaty, which introduced a new title on employment, this strategy is built on thematic priorities, grouped in four pillars and described in Employment Guidelines. Cf. Joint Employment Report 2001 COM(2001) 438 final. Employment Guidelines 2001: Official Journal of the European Communities 24.1.2001 L 22/18.

[12] The Nice European Council in December 2000 approved the European Social Agenda. Cf. Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions COM(2000) 379 final.

[13] The Stockholm European Council in March 2001 endorsed the Commission's intention to create a high level Task Force on Skills and Mobility with a view to presenting an action plan to the Barcelona Spring Council in March 2002. Cf. Communication from the Commission to the Council: 'New European Labour Markets, Open to All, with Access for all' COM(2001)116 final.

[14] As part of the eEurope Action Plan, the eLearning initiative follows up the conclusions of the Lisbon European Council. Cf. Communication from the Commission: eLearning, designing tomorrow's education COM(2000) 318 final.

[15] See Communication from the Commission: Towards a European research area. COM(2000) 6 final; and Communication from the Commission: Mobility Strategy for the European Research Area, COM (2001) 331 final.

[16] The definition of lifelong learning used in the Memorandum was: *"all purposeful learning activity, undertaken on an on-going basis with the aim of improving knowledge, skills and competence".*

[17] Cf. Glossary (Annex II)

[18] The OECD 2001 Education Policy Analysis also examined the distinguishing features of the lifelong learning approach.

[19] The Joint Employment Report 2001 indicates that such strategies are in place in some seven Member States. Joint Employment Report 2001 COM(2001) 438 final.

[20] Cf. Commission Green Paper "Promoting a European framework for Corporate Social Responsibility." COM(2001) 366 final.

[21] Cf. Objective 3.1 of the Follow-up to the Objectives Report: 'Strengthening Links with Working Life and Society at Large'.

[22] The term 'potential' learner is used to denote those who may not be actively engaged in learning, for example those for whom access is a problem e.g. disabled people, or people who may have become alienated from learning, e.g. older people. It may also refer to people who do not capitalise on informal learning, which takes place in everyday activity.

[23] See section 3.5.

[24] The term learning facilitator is used throughout the document to refer to teachers, trainers and others who help people learn in non-formal and informal environments.

[25] Cf. Objective 1.5 of the Follow-up to the Objectives Report: 'Making the Best Use of Resources'.

[26] Cf. Objective 2.1 of the Follow-up to the Objectives Report: 'Open Learning Environment'.

[27] See Communication from the Commission: 'Employment and social policies: a framework for investing in quality' COM(2001) 313 final.

[28] Cf. Objective 2.2 of the Follow-up to the Objectives Report: 'Making Learning More Attractive'.

[29] This approach is taken at European level – see the Joint Employment Report 2001.

[30] Cf. Objective 2.2 of the Follow-up to the Objectives Report: 'Making Learning More Attractive'.

[31] Recommendation of the European Parliament and of the Council (2001/613/EC).

[32] Work in this area will include the activities of the European Forum on the Transparency of Qualifications and the European Forum on the Quality of Vocational Training.

[33] The relevance of this priority for action with more specific regard to the new European labour markets will be outlined in the Commission's forthcoming Skills and Mobility Action Plan.

[34] National Academic Recognition and Information Centres

[35] National Resource Centres for Vocational Guidance

[36] The relevance of these priorities for action with more specific regard to the new European labour markets will be outlined in the Commission's forthcoming Skills and Mobility Action Plan.

[37] This will take account of experiences resulting from the 'Tuning' project (April 2001-June 2002) and the Joint Action project 'Construction of bridges between qualifications: a system of transfer and accumulation of training credits for lifelong learning' (November 2001-February 2003).

[38] The Commission is also creating a one stop information mobility site, which will serve as the access point to the portal on learning opportunities, as well as the EURES database and the proposed Internet portal on youth policy. The relevance of this priority for action with more specific regard to the new European labour markets will be outlined in the Commission's forthcoming Skills and Mobility Action Plan.

[39] The relevance of this priority for action with more specific regard to the new European labour markets will be outlined in the Commission's forthcoming Skills and Mobility Action Plan.

[40] Employment Guidelines 2001: Guideline 3.

[41] The "Innovation 2000 Initiative", implemented by the EIB after Lisbon through the setting-up of a dedicated lending programme of EUR 12-15 billion, should be a significant support to the implementation of lifelong learning.

[42] Lisbon European Council conclusions para. 26, and Employment Guidelines 2001, horizontal objective on lifelong learning.

[43] During the current programming period (2000-2006), the European Social Fund (ESF) will contribute at least EUR 12 billion towards the development of lifelong learning. In addition, the ESF Community Initiative EQUAL has lifelong learning as one of its eight thematic priorities, towards which Member States have allocated the second largest thematic budget.

[44] Employment Guidelines 2001: Guideline 13.

[45] E.g. Research undertaken in the Member States and by the OECD.

[46] COM(2001) 94 final. Proposal for a decision of the European Parliament and of the Council concerning the multiannual framework programme 2002-2006 of the European Community for research, technological development and demonstration activities aimed at contributing towards the creation of the European research area. Priority thematic area: 'Citizens and governance in the European knowledge-based society'. The results of research projects already financed by the Commission under the 5th Framework Programme should be taken into account.

[47] Based on the Report by the Commission Task Force on Measuring Lifelong Learning, the Report on the Quality of School Education, the Progress Report by the Expert Group on Indicators on Quality of Lifelong Learning and the work done by the Forum on the Quality of Vocational Training.

[48] Lisbon European Council conclusions, para. 26; Employment Guidelines 2001; eLearning Action Plan COM(2001) 172 final, p. 11

[49] In the EU, out of a total of 112 million employed people, 74 million are in SMEs; of these, 38 million are in companies of less than 10 employees. Source: "Enterprises in Europe, 2001 edition, Eurostat"

[50] See the third action line of the Commission Communication "Helping SMEs to GoDigital" (COM(2001) 136 final).

[51] This follows up a request in the Lisbon European Council conclusions, para. 29.

[52] The Commission also established in September 2001 an ICT Skills Monitoring Group with representatives from Member States to analyse and monitor the demand for, and availability of, ICT

skills, based on the requirements of industry. See http://europa.eu.int/comm/enterprise/policy/ict-skills.htm.

[53] This priority corresponds exactly to one of the issues identified in the Follow-up to the Objectives Report under objective 1.2.

[54] Charter of Fundamental Rights of the European Union (2000/C 364/01)

[55] Employment Guidelines 2001; the ESDIS e-inclusion report; the Commission and Member States' High Level Group on the Employment and Social Dimension of the Information Society.

[56] Employment Guidelines 2001, Guidelines 3, 15; eEurope; eLearning initiative (2001/C 204/02) and the eLearning Action Plan COM(2001) 172 final

[57] The eLearning initiative (2001/C 204/02); the eLearning Action Plan COM(2001) 172 final.

[58] These issues will be addressed, at the European level, through the Follow-up to the Objectives Report. Under its Objective 1.5 "Making the best use of resources" one of the four main issues is defined as "Supporting quality evaluation and assurance systems using indicators and benchmarking" – building on results of the Bologna process and the Forum on the quality of vocational training.

[59] Part of the 5th Research Framework Programme. Research Projects of the IST Programme address several issues in the field of lifelong learning, covering technologies, systems and services, infrastructures and applications for schools, universities, training settings and non-formal learning.

[60] The results of research projects already financed by the Commission under the 5th Framework Programme should be taken into account.

[61] TEC Article 149 states that "the Community shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action while fully respecting the responsibility of the Member States for the content of teaching and the organisation of education systems…".

[62] See Treaty Article 150.

[63] See Treaty Article 125.

[64] A document giving examples of lifelong learning practice in various European countries, as well as further details on indicators for lifelong learning, is available (Commission services document "Lifelong learning practice and indicators").

[65] The implementation of the activities to be carried out at community level in the framework of lifelong learning will be financed through programmes and processes that are already proposed or adopted and therefore do not require additional resources (financial or human) at this stage.

[66] Research on education and training will be undertaken primarily under Priority 7 ('Citizens in an Evolving Knowledge Society'); access to education and training is also included in the research priorities under the sub-theme 'Knowledge-based European Society'.

[67] A document giving examples of lifelong learning practice in various European countries, as well as further details on indicators for lifelong learning, is available (Commission services document "Lifelong learning practice and indicators").

[68] Commission Communication on Structural Indicators, presenting 35 indicators as a basis for the Synthesis Report. COM (2001) 619. See also COM (2000) 594

[69] Public expenditure on education as a percentage of GDP, source: Unesco-OECD-Eurostat UOE; Percentage of population, aged 25-64, participation in education and training, source: Labour Force Survey (LFS); Share of the population aged 18-24 with only lower-secondary education and not in education or training, source: Labour Force Survey (LFS).

[70] Expenditure on education/training in enterprises as a percentage of labour costs, source Continuing vocational training survey (CVTS); household expenditure on education as a percentage of total expenditure, source Household Budget Survey (HBS); participation in education/training by field of study, source UOE and learning in enterprises by form of learning (CVTS); Average number of pupils per on-line computer in schools, source: Eurobarometer.

[71] eLearning, source the 2001 Communication on Structural Indicators COM (2001) 619: indicator in development.

[72] More technical details on lifelong learning indicators to be developed can be found in the Commission services document "Lifelong learning practice and indicators".

[73] The EMCO Indicators Group develops common indicators to monitor implementation of the Guidelines under the European Employment Strategy.

[74] The Social Protection Committee Indicators Subgroup is preparing a report for the European Council of Laeken with a list of commonly agreed indicators on social inclusion.

[75] COM(2001) 313 of 20.6.2001 "Employment and Social Policies: a framework for investing in quality"

[76] See the report of the Task Force and the proceedings of the Parma conference on measuring lifelong learning at http://forum.europa.eu.int/Public/irc/dsis/cgies/library?l=/seminars/measuring_lifelong&vm=detailed&sb=Title

[77] A report was presented to the conference in Riga on 28 and 29 June and will be published shortly.

[78] Key issues, which apply equally to both qualitative and quantitative indicators are: how people learn; fields of learning; motivation, obstacles and effectiveness. The three most important steps will be the preparation of the 2003 [redacted] module on adult learning, the 2005 Adult Education Survey proposed by the Commission and a planned third survey of learning in enterprises (CVTS). The Commission will aim to harmonise several other surveys with a view to developing a coherent collection system.

[79] E.g. Research undertaken in the Member States and by the OECD.

[80] COM (2001) 94 final. Proposal for a decision of the European Parliament and of the Council concerning the multiannual framework programme 2002-2006 of the European Community for research, technological development and demonstration activities aimed at contributing towards the creation of the European research area. Priority thematic area: "Citizens and governance in the European knowledge-based society". The results of research projects already financed by the Commission under the 5th Framework Programme should be taken into account.

[81] Part of the 5th Research Framework Programme. Research Projects of the IST Programme address several issues in the field of lifelong learning, covering technologies, systems and services, infrastructures and applications for schools, universities, training settings and non-formal learning.

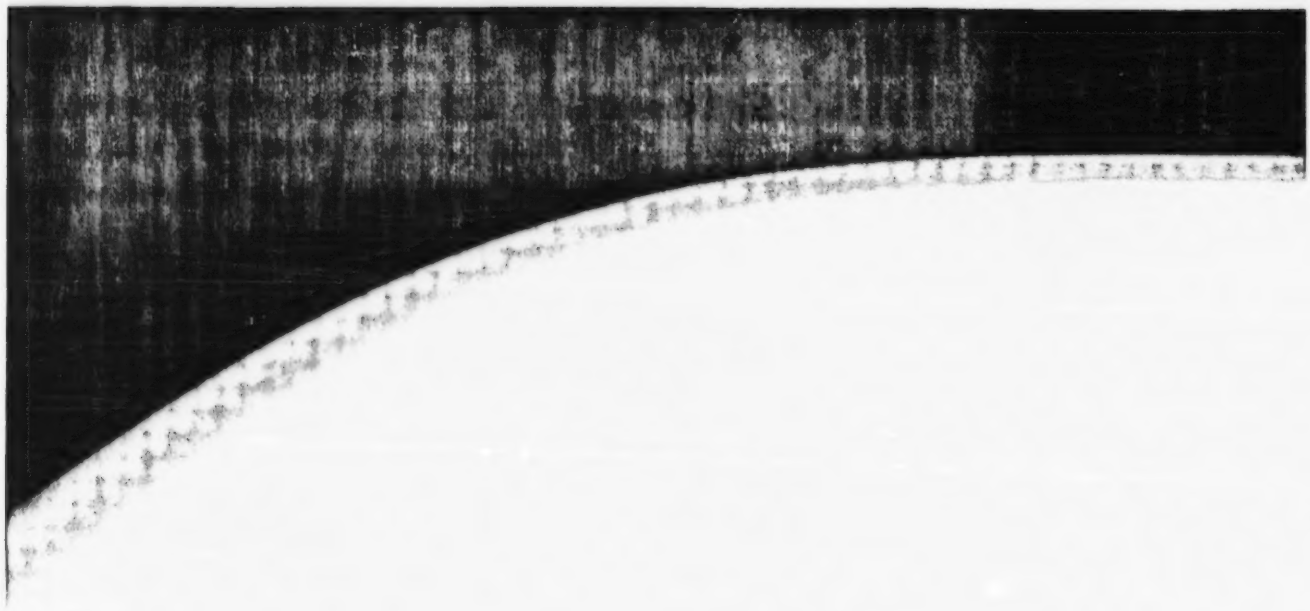
[82] The results of research projects already financed by the Commission under the 5th Framework Programme should be taken into account.

[83] For example the study of barriers to the participation of adults in higher education, undertaken within the Research Framework Programme.

[84] See the Commission Communication endorsed by the Special Jobs Summit which launched the European Employment Strategy:
http://europa.eu.int/comm/employment_social/elm/summit/en/papers/guide.htm

[85] See also the definition drawn up by ECOSOC in its Opinion of 22 September 1999 which will be used in forthcoming guidelines on consultation and dialogue with civil society (following up the European Governance White Paper): Official Journal of the European Communities (1999/C329/10)

[86] See the Commission Communication endorsed by the Special Jobs Summit which launched the European Employment Strategy:
http://europa.eu.int/comm/employment_social/elm/summit/en/papers/guide.htm



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